

Adams 14

School District

RESPONSE TO RFP/RFO
EXTERNAL MANAGEMENT PARTNER
SYSTEMIC IMPROVEMENT AND TURNAROUND PLAN



TABLE OF **CONTENTS**

SECTION ONE – LETTER OF INTEREST	2
SECTION TWO – EXPERIENCE AND QUALIFICATIONS	4
SECTION THREE – SCOPE OF SERVICES	8
SECTION FOUR – SCHEDULE	11
SECTION FIVE – REFERENCES	14
ADDENDUM – LEADERSHIP RESUMES	17

SECTION ONE - **LETTER OF INTEREST**

January 15, 2019

Dear Selection Committee,

Please accept this letter as an expression of the BrandED Consultants Group's interest in serving as the External Management Partner with Adams 14 to develop, implement and assess a systemic improvement and turnaround plan for the District. As you review our application materials, we are confident that you will see that our credentials align with the Districts' mission, vision and criteria for this strategic partnership, as well as our commitment to fulfilling the Accountability Recommendations from the State of Colorado Board of Education and the mandate of Colorado HB 18-1355 to ensure all students receive a high quality education that prepares them for college, career and life.

In 2005 the BrandED Consultants Group was founded in response to the increasing need for PK-12 schools, colleges, universities and organizations with an education mission to take a more strategic approach to organization development, operationalizing strategic plans, building sustainable brands, satisfying accreditation criteria, aligning curriculum, complying with regulations, ensuring effective operations, creating inclusive and diverse communities, as well as recruiting and retaining families, employees, donors and strategic partners to ensure student success. In concert with our academic partners, we co-create sustainable strategies based on mission, vision, core values and stakeholder engagement.

Our leadership team brings over 75 years combined experience working with schools, a global academic perspective and systemic management expertise. As recognized innovators and thought leaders in student success, organization development and reputation building for schools and systems of schools, we have published papers and have presented at conferences around the world. We are on the experts guide for several publications and provide points of view on industry trends. Our leadership is visionary, strategic, entrepreneurial and innovative. We have an inclusive, collaborative and empowering management style.

For public and private schools and systems of schools PK-higher education, BrandED counsels superintendents, presidents, boards of education, senior leadership teams, teachers, talent management, students, parents, alumni, donors, community and strategic partners on translating initiatives to action through strategic plans, master plans, media relations, public affairs, learning initiatives, capital campaigns, auxiliary services, legal counsel, crisis communications, issues management, government relations, reputation management and thought leadership.

We collaborate to effectively integrate and assess strategic priorities into curriculum development, enrollment management, advancement, employee recruitment, onboarding of new hires, professional development processes and establishment of key performance indicators that align with mission, vision, core values and strategic priorities. Our work provides a comprehensive road map for organizations to find their voice, establish a common language, create value, maximize demand, fulfill mission, realize a shared vision and ensure student success.

Our work is research-based and guided by a model we created known as the Six Cs of Stakeholder Engagement in Education which professes utilization of Core Values, Connections, Conversations, Collaborations, Community and Culture to align internal culture with external reputation. This systemic approach motivates a relevant analysis of an organization's ability to effectively deliver on its promise. From preschools to PhDs, this applied model has led to record enrollment, improved academic outcomes, increased retention of students, employees and investors, as well as clear pathways to college and careers, collaborative cultures, reinvigorated communities, new sources of revenue and successful capital campaigns.

We are confident that a partnership between Adams 14 School District and the BrandED Consultants Group will exceed desired outcomes in terms of curriculum alignment, organizational culture shift, instructional transformation, leadership development, enhanced community engagement and future viability. Our passion is ensuring our partner schools and systems of schools advance their mission and vision, and achieve their strategic goals. We welcome the opportunity to bring our models of success to the Adams 14 School District, and play a lead role in taking the District to the next level.

Upon review of our credentials, please feel free to contact me if you have questions or need additional information. Thank you for your consideration.

Sincerely,



Rex Whisman

Chief Strategist and Project Manager
BrandED Consultants Group
5743 Teller Street #503
Arvada, Colorado 80002

SECTION TWO - **EXPERIENCE AND QUALIFICATIONS**

ABOUT US

The BrandED Consultants Group is a national consultancy based in Arvada, Colorado dedicated to organizations with an educational mission, including PK-12 schools, colleges and universities. In 2005 BrandED's Chief Strategist, Rex Whisman, founded the organization in response to the increasing need for schools and systems of schools to take a more strategic and sustainable approach to academic success, organizational development and brand building to ensure schools:

- Meet academic standards
- Achieve student success
- Grow enrollment
- Increase retention
- Expand funding
- Improve systems
- Operationalize strategic plans
- Satisfy accreditation criteria
- Comply with regulations
- Develop inclusive and diverse school communities
- Fulfill mission, vision, core values and strategic priorities

We develop strategies and counsel superintendents, principals, boards of education, senior leadership, talent management, teachers, staff, alumni, students, parents, donors, community and strategic partners on translating initiatives to action through master plans, enrollment management, fundraising, media relations, public affairs, professional development, curriculum development, learning initiatives, auxiliary services, capital campaigns, crisis communications, issues management, government relations and thought leadership to ensure a shared vision, common language, and alignment of culture and reputation across the school enterprise.

WHAT WE DO

- Assess positioning, systems and operations
- Provide research, insights, findings and recommendations
- Develop, advance and assess strategies
- Synchronize curriculum, enrollment management, fundraising, employee relations and strategic planning
- Create seamless experiences for new and continuing students, employees and strategic partners
- Devise and implement metrics to measure success

OUR WORK IN EDUCATION

PK-12 schools and institutions of higher learning turn to the BrandED Consultants Group when they need to improve student success, grow enrollment, increase retention, operationalize strategic plans, prepare for capital campaigns, increase awareness or face issues that threaten their image or reputation. We have worked collaboratively with public and private schools throughout the United States from preschool to PhD.

Projects that we lead result in:

- Record new student enrollment and retention rates
- Enhanced academic outcomes and improved graduation rates
- Expansion and diversity of financial portfolios
- Collegial communities and collaborative cultures
- Heightened strategic thinking, efficient operations and organizational pride

SAMPLING OF SCHOOLS, SYSTEMS OF SCHOOLS AND PUBLIC ORGANIZATIONS WE HAVE SERVED

- Catholic School Districts of Denver and San Antonio
- Colorado Department of Regulatory Agencies
- Colorado State University System
- Denver Public Schools
- Laramie County Community College
- Leeds School of Business, University of Colorado Boulder
- Lynn, Massachusetts Schools Collaborative
- National Center for Atmospheric Research
- P-20 Lasallian Schools of North America
- St. Vrain School District
- University of Denver
- University of Wyoming

OUR TEAM OF EXPERTS

The BrandED Consultants Group anticipates the following experts to lead the external management team. Highlighted for your review and consideration are our respective roles and responsibilities for this initiative, and a summary of our credentials. As with all of our projects, we anticipate additional members will be added to the team to fulfill the goals and objectives of the project. In terms of the Adams 14 systemic improvement and turnaround plan, we will provide appropriate Spanish translation, stakeholder engagement, student achievement and operations expertise as needed.

Rex Whisman, Chief Strategist and Project Manager



Mr. Whisman is the Chief Strategist for the Arvada, Colorado-based BrandED Consultants Group. Rex founded BrandED in response to the increasing need for PK-12 schools, colleges, universities and organizations with an education mission to take a more strategic approach to organization development, operationalizing strategic plans, building sustainable brands, satisfying accreditation criteria, aligning curriculum, complying with regulations, ensuring effective operations, creating inclusive and diverse communities, as well as recruiting and retaining families, employees, donors and strategic partners to ensure student success.

Mr. Whisman will serve as project manager, communications strategist, reputation builder and enrollment management officer for the Adams 14 systemic improvement and turnaround initiative. Rex has led the

development, implementation and assessment of successful image building, enrollment management and turnaround plans for PK-12 schools, colleges and universities throughout the United States. His work has led to record enrollment, improved retention, increased awareness, engaged alumni, collaborative cultures and reinvigorated impoverished communities.

Prior to founding BrandED, Rex was Assistant Vice Chancellor for the University of Denver where he created one of the first enterprise approaches to organizational and brand development in education. Previously, Rex was Vice President for Enrollment Management and Communications for Rocky Mountain College of Art + Design, where he connected the college's registration and financial aid offices, and integrated those with new student recruitment and communications functions to form the college's first enrollment management department. He developed systems for staffing, competitor analysis, market segmentation and processes for effective internal and external operations to recruit and retain the right students, employees, influencers and strategic partners.

Rex has served as President for the Colorado Art Education Association and taught social studies at East Yuma County Schools in eastern Colorado. He holds a Master of Science in Communications Management and a Bachelor Arts in History, both from Colorado State University.

Dr. Sara Baird Amodio: Chief Academic Officer



Dr. Amodio resides in Erie, Colorado and brings extensive experience as an educational administrator, educational psychologist, a private consultant for international non-governmental organizations, and a graduate faculty member. Sara holds an MSW from Stockholm University in Sweden with an emphasis on organizational development and administration. Her Doctorate in Education from Regent University specialized in assessment, evaluation, and curriculum development.

Following her graduate work at Stockholm University in Sweden, Dr. Amodio received specialized evaluation research training through the *forskarutbildning* (Research Development) pre-doctoral program at the Socialhögskolan (School of Social Sciences). As part of this training, she collaborated with SIDA (Swedish International Development Agency) to evaluate social support capacity in South Africa's education sector. As a high-marks graduate member of the Royal Swedish Academy, she was a voting member for the Nobel Prize for economics in 1996.

As part of her doctoral dissertation, Dr. Amodio provided educational consultancy services for Food For The Poor in Haiti. Food For The Poor is among the top 10 largest American INGO-charity organizations and serves Latin America and the Caribbean. The educational consultancy involved setting up educational programs - with curriculum and teacher training efforts - in Haiti, and evaluating the institutional capacity of such efforts to ensure long-term sustainability. She has led teams to Haiti to train teachers on identification of signs of PTSD in students post natural disasters.

Dr. Amodio has served as an Instructional Dean at Emily Griffith Technical College, principal, a K-8 school counselor post-September 11 in the Washington, D.C. area, and a middle school teacher. She was invited to

serve on the Design for Excellence evaluation team in the Diocese of Arlington (Washington, D.C. metropolitan area) and a member of the Steering Committee for the Archdiocese of Denver's Accreditation Team. She was recognized by U.S. Senator Michael Bennet, former Superintendent of Denver Public Schools, for her service to youth and received the Administrator Award through the Asian Education Advisory Council for Denver Public Schools. Sara will serve as chief academic officer for the systemic improvement and turnaround plan.

Rick Johnson: Chief Operations Officer



Mr. Johnson brings to the team over thirty years of administrative leadership experience within the educational setting. Residing in Broomfield, Colorado, Rick currently serves as the Vice President of Administration and Finance at Laramie County Community College in Cheyenne, WY. Rick will soon complete his commitment at LCCC. Prior to this role, he worked for the University of Colorado Leeds School of Business in Boulder, CO, the National Center for Atmospheric Research (NCAR) in Boulder, CO, and the University of Wyoming in Laramie, WY.

Rick has devoted his entire career to transforming the lives of students, and is passionate about driving operational support structures that deliver student success. His broad, cross-discipline, educational expertise centers around conceiving, building and executing infrastructures that enable educational entities to successfully deliver performance based outcomes, and doing so with innovative leadership that empowers people, propelling organizational success. He has a proven track record of executing effective change management with approaches that proactively engage and support organizational staff.

Rick's extensive leadership experience has spanned from successfully growing revenue generating service operations, to re-engineering complex fiscal structures aligned with strategic planning, to scaling administrative & educational operations to accommodate rapid growth, to leading critical master planning and expansion initiatives.

Rick is a certified Project Management Professional (PMP), and holds a B.S. degree in Secondary Science Education and an M.S. degree in Water Resource Engineering. Rick will serve as the chief operations officer for the systemic improvement and turnaround plan.

SECTION THREE - **SCOPE OF SERVICES**

The BrandED Consultants Group is committed to fulfilling the Accountability Recommendations from the State of Colorado Board of Education and the mandate of Colorado HB 18-1355 to ensure all students receive a high quality education that prepares them for college, career and life. In partnership with the Adams 14 School District, BrandED will develop, implement and assess a systemic improvement and turnaround plan.

Based upon our knowledge to date, the following highlights the process, stakeholder engagement model, strategic approach and scope services we propose to enable the District to achieve curriculum alignment, organizational culture shift, instructional transformation, enhanced community engagement, leadership development and future viability. After gaining a complete understanding of the needs and expectations from the District, we will provide the appropriate additions and relevant revisions to the proposed scope of services.

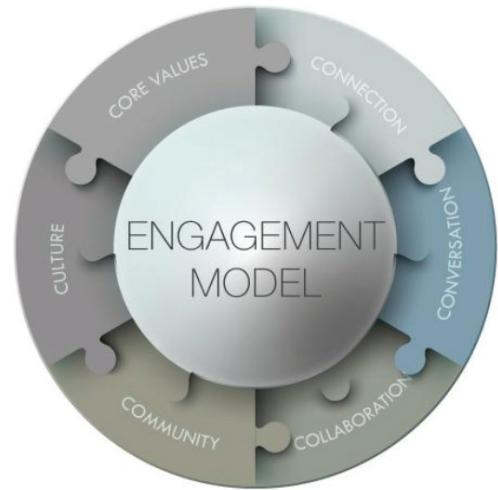
GETTING STARTED

BrandED will gain a full understanding of the District's mission, values and goals, where the District is at in its accreditation cycle, and relevant recommendations and regulations related to effectively creating a systemic improvement and turnaround plan for Adams 14. The first step in the process is a kick off meeting with the project leadership team from Adams 14 School District and the BrandED Consultants Group to ensure everyone is in agreement on project goals, scope of services, objectives, timeline, visit schedules, milestones and outcomes. A point person from each team will be identified to ensure effective communications.

The process of developing a systemic improvement and turnaround plan for Adams 14 will include a series of individual interviews with senior leadership and the board, and a series of group meetings with representative samples of stakeholders from the District and community. The interviews and group meetings will determine how closely aligned internal and external experiences, perspectives and opinions of Adams 14 are with one another, and how closely aligned experiences, perspectives and opinions are with Adams 14's mission, core values and strategic priorities.

STAKEHOLDER ENGAGEMENT MODEL

In guiding schools, colleges and universities towards effective management, BrandED incorporates our stakeholder engagement model which professes utilization of Core Values, Connections, Conversations, Collaborations, Community and Culture. Engaging stakeholders in this process motivates a relevant analysis of our partner school's ability to effectively align their internal culture with their external reputation, deliver on their promise and attract and retain the right families, employees, donors and community and strategic partners to ensure future viability.



A STRATEGIC APPROACH

The BrandED Consultants Group will apply its stakeholder engagement model to develop, implement and assess a systemic improvement and turnaround plan for Adams 14 School District. The District's mission, vision,

values and goals, as well as issues related to student success, awareness, perception, competition, affordability, diversity, inclusion and the local economy will steer our approach. We will ensure our process reflects the Adams 14 strategic plan, accreditation criteria and regulatory compliance.

DISCOVERY AND ENGAGEMENT

The discovery process will include a thorough review of the Accountability Recommendations from the State of Colorado Board of Education, previous research and community engagement conducted, and an assessment of how Adams 14 currently positions the District against its competition. BrandED will determine how the Adams 14 mission, vision and values have been interpreted and applied across relevant touch points, and determine how closely aligned these touch points are internally and externally.

BrandED will facilitate a series of engagement sessions to help stakeholders understand the value of the systemic improvement and turnaround plan, ensure transparency, gather buy-in, build trust, garner confidence, create consensus, manage expectations, define desired outcomes and provide the opportunity for stakeholders to share their opinions, experiences, perspectives and recommendations for developing and implementing a sustainable strategy. The engagement sessions will include individual interviews and focus groups with participants representing District stakeholders including, district and school Leadership, board of education, teachers, staff, parents, students, alumni, and community members and local businesses.

STRATEGIC COMMUNICATIONS

The BrandED Consultants Group will engage Adams 14 leadership and stakeholders to develop a strategic communications platform and narrative to provide updates and ongoing communications of progress towards systemic improvement and turnaround milestones for the District. The strategic communications platform will:

- Serve as an emotive and functional messaging resource during planning, implementation and assessment
- Capture the essence of the mission, vision and core values of the District
- Ensure the essence of Adams 14 is communicated in an accurate, authentic, compelling, concise and consistent manner
- Integrate with, and be reflective of, any previous strategic communications to date
- Guide the design and execution of initiative communications
- Heighten stakeholder engagement and demonstrate value
- Add greater value to the Adams 14 brand
- Guide current branding and future re-branding

INSTRUCTIONAL TRANSFORMATION

The BrandED Consultants Group will engage Adams 14 leadership, educators and other key stakeholders to develop a research-based strategy to assess the current efficacy of the *Beyond Textbooks* partnership. BrandED will then, based on this assessment, collaborate with leadership, educators, and stakeholders to develop a renewed evidence-based instructional program to address identified issues. The instructional program will:

- Serve as a way for leadership, educators, and other key stakeholders to have a collaborative voice in the development of an innovative and forward-thinking curriculum tailored to meet the needs of the student population
- Align with State and National Standards in meaningful and rigorous ways
- Capture the essence of the mission, vision and core values of the District
- Detail the assessment modalities that will provide timely and useful feedback to educators
- Clarify a framework for instructional delivery through horizontally- and vertically-integrated curriculum mapping
- Address critical touchpoints for English language learners, students with identified special instructional needs, and academically at-risk students
- Identify areas for future professional development for educators
- Detail various CTE and higher educational pathways

OPERATIONS AND FINANCIAL MANAGEMENT

BrandED will engage Adams 14 leadership, educators, staff, community and other key stakeholders to assess employee recruitment and retention, orientation, training and development programs, job descriptions, payroll and benefits to determine effective processes, communications, functionality, motivation and outcomes.

BrandED will evaluate the District's master plan, facilities plan, budget process, capital improvements, maintenance strategy, facility safety, emergency preparedness and infrastructure to determine operational and systems effectiveness. BrandED will partner with District stakeholders to create transparent, efficient and cost effective processes to allocate resources and accountability.

ENROLLMENT MANAGEMENT

BrandED will engage the Board of Education, District and School leadership and other stakeholders to assess current student recruitment and retention methodologies, programs and measures. BrandED will then develop and implement a strategic enrollment management plan that integrates with District communications and marketing plans to ensure sustainable growth of new student recruitment and retention of current students.

The enrollment management plan will include the following new student recruitment, current student retention and stakeholder engagement components:

- Feeder school recruitment and transfer program
- Campus visits and tours
- Special events, including open house
- Customer relationship management technology
- New family orientation
- Student retention program
- Parent engagement program
- Administration, staff and board engagement program
- Influencer engagement program
- Alumni relations program
- Summer melt program
- Other appropriate components

SECTION FOUR - **SCHEDULE**

FIRST SIX MONTHS OF THE SYSTEMIC IMPROVEMENT AND TURNAROUND PLAN

During the first six months of the systemic improvement and turnaround plan, the BrandED Consultants Group will conduct a thorough sustainability assessment of the District, including those highlighted below. Upon further clarity of requirements, expectations and recommendations, other appropriate and critical areas will be included for review.

INSTRUCTIONAL TRANSFORMATION

The BrandED Consultants Group will engage Adams 14 leadership, educators, and other key stakeholders to develop a research-based strategy to assess the current efficacy of the *Beyond Textbooks* partnership and other key partnerships related to curriculum and instruction. This strategy will rely heavily upon Curriculum Support Network Analyses and Professional Support Network Analyses. Simultaneously, BrandED will work in partnership with the leadership, educators, and stakeholders to identify appropriate curriculum-to-instruction (C2I) teams that are vertically and horizontally aligned within the District.

OPERATIONS AND FINANCIAL MANAGEMENT

BrandED will engage Adams 14 leadership, educators, staff, community and other key stakeholders to assess the District's:

- Strategic plan and priorities
- Human resources policies, processes and programs
- Facilities, infrastructure and auxiliary services management
- Capital improvements
- Financial services and budget process
- Safety and emergency preparedness plan
- Risk management strategy

ENROLLMENT MANAGEMENT

BrandED will engage the Board of Education, District and School leadership and other stakeholders to assess current student recruitment and retention methodologies, programs and measures. BrandED will then develop and implement a strategic enrollment management plan that integrates with District communications and marketing plans to ensure sustainable growth of new student recruitment and retention of current students.

BRAND STRATEGY

BrandED will provide a touch point analysis and engage stakeholders to assess the image and reputation of the District. BrandED will determine how closely aligned the internal culture is with its external reputation. A series of engagement sessions will provide opportunities for stakeholders to share their opinions, perspectives and experiences related to the internal and external image of the Adams 14 brand.

COMPLETION OF THE THE SYSTEMIC IMPROVEMENT AND TURNAROUND PLAN

The following highlights the next 42 months to complete the systemic improvement and turnaround plan, including metrics for assessment.

INSTRUCTIONAL TRANSFORMATION

BrandED will work with C2I Teams to identify goals, clarify instructional issues, and develop accountability and monitoring systems for the District. A rigorous and culturally responsive instructional framework will be developed and will address key student population issues. Concurrently, metrics to assess the instructional framework will be clarified and will strive to promote reflective teaching practices and a growth mindset within the schools; essentially helping educators answer the question "Did it work?" and providing guidance for a more timely recalibration of instruction.

BrandED will work with the District leadership, principals and educators to develop a District-wide professional development plan, supported by the key findings in the development of the instructional framework and assessment metrics. The professional development plan will integrate the brand strategy, including new hire orientation, goal-setting, retention and evaluation processes. The key components of the District-wide professional development plan will include:

- Technical Assistance
- C2I Lesson Studies
- Consultation
- Coaching
- Communities of Practice
- Reflective Supervision

OPERATIONS AND FINANCIAL MANAGEMENT

BrandED will work with Adams 14 leadership, educators, staff, community and other key stakeholders to strengthen employee training, effectiveness, evaluation and accountability, as well as develop a data-driven culture to ensure continuous improvement.

BrandED will partner with District stakeholders to create transparent, efficient and cost effective processes to allocate resources and accountability. BrandED will provide leadership in the assessment and implementation of the District's master plan to determine the sustainability of current facilities, improvements and repairs, safety, infrastructure, functionality, space planning, community and other use.

BrandED will lead efforts to expand outreach, strategic partnerships, donor relations and sponsorships to ensure financial, physical and technology resources are available to improve systems, communications, performance, facilities and operations. Key Performance Indicators can include:

- Employee satisfaction surveys
- Employee turnover rates
- Ratios for financial health

- Physical and technology assets
- Crime statistics
- Employee turnover rates

ENROLLMENT MANAGEMENT

BrandED will work with the Board of Education, District leadership, principals and other stakeholders to create and implement a comprehensive enrollment management plan to help ensure long term sustainability for the District. Annual enrollment management metrics can include:

- Prospect to inquiry conversion rate
- Inquiry to applicant conversion rate
- Applicant to enrolled student conversion rate
- Retention rate from class to class
- Graduation rate
- Applicant, enrolled student, retained student and graduate profile comparisons
- Google Analytics
- Campaign analytics, impressions, behaviors, actions
- Other appropriate measures

BRAND STRATEGY

The BrandED Consultants Group will provide guidance for developing an effective brand strategy and make recommendations for capturing the essence of the District's assets so that those assets can be communicated in an accurate, authentic, concise, consistent and compelling manner.

BrandED Group will counsel human resources and department supervisors to integrate the brand strategy into employee relations programs, including employee recruitment, new hire orientation, goal-setting, retention and evaluation processes. BrandED will work with development staff and volunteers to integrate the brand strategy into the donor and sponsorship recruitment and retention process. BrandED will share with admissions teams best practices for integration of the brand strategy into the student and family recruitment and retention process.

BrandED will work in partnership with the communications and marketing staff, as well as human resources to implement the brand strategy to align the District's internal culture and external reputation. BrandED will work with Adams 14 professionals to integrate the brand strategy with appropriate digital content, website, social media platforms, advertising, events, collateral materials, conferences and other touch points that bring to life the Adams 14 brand. The brand strategy can serve as a foundation for future re-branding of the District. Key metrics will include:

- Recruitment and retention of students, employees and donors
- Giving rates from donors and sponsors
- Media impressions
- Communications and marketing messaging
- Website and social media engagement
- Thought leadership and publications
- Return on investment

SECTION FIVE - REFERENCES

LYNN, MASSACHUSETTS SCHOOLS COLLABORATIVE

The BrandED Consultants Group, spearheaded by Rex Whisman in partnership with the Lynn Catholic Schools Collaborative is currently leading a systemic improvement and turnaround initiative north of Boston. BrandED is working with the areas most diverse Catholic schools to create a consolidation and sustainability plan that will establish a STEM focused system of schools that will align curriculum, grow enrollment, improve academic outcomes, expand the donor base and create effective pathways to college and career success.

BrandED is also working with the City of Lynn, Massachusetts to explore opportunities to leverage the City's schools and their alumni to improve the image and reputation of the industrial and economically challenged City of Lynn, Massachusetts. A new Education District comprised of local private and public schools, and local business partners has been established to serve as an anchor for arts, cultural and economic development.

The early results look favorable. For example, at St. Mary's High School, campus visits are up 33% with a 54% increase in applications for next fall to reach an enrollment growth goal from 505 to 550 students. A significant increase in donor participation led to creation of a new scholarship program implemented last fall and already has 90 applicants for next fall.

Contact:

Dr. John F. Dolan

Head of School

St. Mary's Lynn

781.595.7885

John.dolan@stmaryslynn.com

UNIVERSITY OF COLORADO BOULDER, LEEDS SCHOOL OF BUSINESS

While serving as Assistant Dean, Chief Operating and Financial Officer for the Leeds School of Business at the University of Colorado Boulder, Rick Johnson hired Rex Whisman to partner with him to assess the enrollment, culture, reputation and retention at Leeds. The review found that the business school did not have a clear vision, little stakeholder engagement, and a culture that lacked a strategic approach to inclusion and shared decision making.

Rex and Rick led the process to develop and implement a sustainability plan for the School that included an effective brand strategy, capital campaign, enhanced curriculum, gender equity initiative and a culture of inclusion and diversity. Their work laid the foundation for a 10% increase in student diversity and 35% increase in retention of students of color, an annual reduction of staff turnover from 50% to 19%, the launch of the largest academic minors program on campus and a culture of racial equality and gender equity.

An improved image and reputation from the success of the brand strategy led by Rex Whisman, and the financial and facility expertise and guidance from Rick Johnson, led to a successful campaign to raise \$50 million for a facilities expansion and strategic partnership with the CU Boulder School of Engineering.

Contact:

Erik Jeffries

Director of Marketing

Leeds School of Business

University of Colorado Boulder

995 Regent Drive

Boulder, Colorado 80309

303.638.8381

erik.jeffries@colorado.edu

LASALLIAN EDUCATION SCHOOLS OF NORTH AMERICA

The Lasallian Education Schools system is comprised of 150 private schools PK-20 across the United States, Canada and Palestine, including Mullen High School in Colorado, and is a part of a diverse international network of schools. For years the North America region of schools lacked cohesion, awareness, a pathway from grade level to grade level and a vision for the future. Many of the schools, including La Salle University in Philadelphia are located in impoverished areas.

The BrandED Consultants Group, led by Rex Whisman, was hired to develop a sustainability plan. We engaged stakeholders in 14 cities to determine opinions, experiences, perceptions and recommendations for creating a viable plan for the future. We assessed alignment of curriculum, operations and systems, as well as the ability to recruit and retain families, employees, donors and strategic partners. The strategy created by BrandED focused on the rich history of the international network and academic outcomes, and a campaign concept of *Transforming Lives Since 1680*.

Success was achieved as a system and at local schools. For example, La Salle University experienced a 23% increase in new student admissions, 55% increase in new student admissions from network schools, 14 % increase in diversity, a capital campaign to build a \$35 million business school and economic revitalization through business and city partnerships in northwest Philadelphia. **Money** magazine named the school the eighth best college for value in the United States.

Contact:

Frank Cawley

Director of Admissions

Mullen High School

303.761.1765 ext. 3304

Frank.cawley@mullenhigh.com

POSNER CENTER

The Posner Center, founded by former Colorado State legislator Andrew Romanoff, is an innovative international collaborative located in Denver. Its unique model consists of non-profits, social enterprises, businesses, and a wide array of organizational types. The range of activities covered by the various partners and tenants are diverse, from agriculture to engineering to education. The goal of The Posner Center capitalizes upon this diversity to allow its members to identify common best practices and leverage their communal resources.

With this goal in mind, the Posner Center established collaboration grants for its members around a particular issue. Dr. Amodio spearheaded the first of these grants and consulted a group of nonprofits in the development of a entrepreneurship curriculum to be used in countries on three different continents. The curriculum was evidence-based and allowed for various technological capacities. Because of the international nature of the project, particular attention needed to be paid to the inclusion of cultural contexts. Additionally, training guides for teachers and implementation strategies were developed.

Contact:

Maria Rosa Galter
Executive Director, AfricAid
www.africaid.com
Skype: AfricAid USA
720.810.2837
maria@africaid.com

ADDENDUM - LEADERSHIP TEAM RESUMES

REX WHISMAN

EXPERIENCE

Founder and Chief Strategist, BrandED Consultants Group LLC, 2005-present.

- Founded BrandED in response to the increasing need for colleges, universities, PK-12 schools and organizations with an education mission to develop, advance and manage a strategic and sustainable approach to organizational development.
- Serves as visionary thought leader and project manager overseeing, coaching, inspiring and mentoring diverse teams of education professionals.
- Creates strategies to align mission, vision, core values, stakeholder engagement and innovation to meet standards, operationalize strategic plans, comply with regulations, ensure efficient operations and create inclusive and diverse communities.
- Counsels superintendents, presidents, board of education, senior leadership teams, teachers, donors, talent management, employee groups, students, parents, alumni and strategic partners on translating initiatives to action through strategic plans, master plans, campaigns, legal counsel, media relations, crisis communications, reputation management, systems management, issues management, government relations, employee relations and thought leadership.
- Collaborates with senior leadership teams, talent management and employee groups to integrate strategic priorities into curriculum development, learning initiatives, enrollment management, advancement, employee recruitment, onboarding of new hires, professional development processes and establishment of key performance indicators that align with mission, core values and strategic priorities.
- Provides a comprehensive road map for organizations to find their voice, establish a common language, create value, maximize demand, fulfill mission and realize a shared vision. Initiatives have resulted in record enrollment, student success, expanded investor base, new sources of revenue, collaborative cultures and reinvigorated communities.
- Creates standards and benchmarks to measure success.
- Provides expertise on data analytics, research insights, writing and editing strategic communications, meeting agendas and editorial content.
- Presents at state, national and international conferences.
- Serves as company spokesperson and provides commentary to media outlets.
- Directs business development, contract negotiations and budget forecasting.

Assistant Vice Chancellor for Communications and Marketing, University of Denver, 2000-2005

- Served as chief marketing officer for Top 100 University.
- Proposed and led one of education's first enterprise approaches to brand and organizational development.

- Advised chancellor, president, provost, vice chancellors, board of trustees, talent management, employee groups and other stakeholders on implementation and execution of strategic priorities via an overarching brand platform.
- During tenure undergraduate first year enrollments increased from 650 to 1050, new student inquiries increased 15%, yield rates improved 3%, retention rates improved from 85 to 90%, graduation rates improved 10%, average ACT scores went from 23 to 26, average SAT scores increased from 1150 to 1250 and US News & World Report rankings improved from 98 to 88. Tuition discounting and acceptance rates declined. The brand strategy led to a donor base increase of 25,000 and \$490 million was raised for a capital campaign.
- Directed, inspired, managed and mentored central administration staff, chaired brand champion committee and administered division budget.
- Developed annual campaigns for enrollment, advancement, athletics and academic divisions.

Vice President for Enrollment Management and Communications, Rocky Mountain College of Art + Design, 1990-2000

- Created the first enrollment management department for private arts college.
- Established domestic and international recruitment program, financial aid packaging, budget forecasting, competitor analysis, market segmentation, operations, systems management and professional development programs.
- Hired, trained, managed and assessed central administrative staff.
- During tenure, student body increased fourfold, retention improved by 20%, achieved a yield rate of 70% and academic profiles dramatically improved.
- Created a culture of collaboration, and reputation grew from a local art school to an internationally recognized college.
- Oversaw internal and external communications, annual marketing campaigns, vendor relations, crisis communications and media relations.
- Represented President for events, meetings and community engagement.
- Member of President's Cabinet with chair responsibilities for strategic planning, regional accreditation and retention committees.
- Served as President of the Colorado Art Education Association leading advocacy, outreach, fund raising, board development, membership and events management.

OTHER RELEVANT POSITIONS

- President, Colorado Art Education Association
- Development Director, Junior Achievement
- Teacher, East Yuma County School

A SAMPLING OF PRESENTATIONS

- The Impact of Social Justice Issues on Brand Image, Southwestern Business Deans Association, Colorado Springs, CO, June 12, 2017
- Creating Greater Value for Brand YOU, Metropolitan State University, Denver, CO, October 9, 2015

- Design Thinking: A Systemic Approach to Herding Cats, University and College Designer's Association Design Summit, Indianapolis, IN, March 27, 2014
- A Social Media Approach to Employee Engagement, Strategic Internal Communications Conference, San Francisco, CA, October 5, 2011
- An Academic Enterprise Approach to Branding, International Thought Leaders Conference in Brand Management, University of Lugano, Lugano, Switzerland, March 12, 2011
- Redesigning Your Role as Internal Brand Champion, University and College Designer's Association National Conference, Seattle, WA, October 4, 2009
- Internal Branding: A University's Most Valuable Intangible Asset, Academy of Marketing International Conference, Emory University, Atlanta, GA, September 12, 2008
- Discover or Re-Discover Your Roots by Engaging in an Audit, University & College Designer's Association International Conference, Toronto, Canada, September 29, 2007
- The World of Education Branding, Swiss Federal Institute of Technology, Zurich, Switzerland, August 25, 2007
- Using an Effective Positioning Strategy to Improve Enrollment and Funding Levels, Strategic Higher and Vocational Education marketing Conference, Sydney, Australia, May 3, 2006

PROFESSIONAL AFFILIATIONS

- American Marketing Association- Past Vice President for Brand Management
- Association for Strategic Planning- Affiliate Member
- Colorado Art Education Association- Past President and Lifetime Member
- The Wharton School, University of Pennsylvania- Advisory Panel of Executives
- University & College Designers Association- Lifetime Member

EDUCATION

- Master of Science in Communications Management, Colorado State University
- Bachelor of Arts in History, Colorado State University
- Research Certification, University of Denver

DR. SARA AMODIO

EDUCATION

Ed.D., Doctorate in Education - Educational Psychology - Regent University. Virginia Beach, VA, 2007. CAGS certificate. Dissertation performed through a grant from Food For the Poor to establish flagship CTE program in Haiti. Graduate Assistant for statistics graduate-level courses. Credits transferred from Marymount University's Catholic School Leadership Program.

MSW, Stockholm University, Sweden 1998. Received Diploma from International Graduate School and Socialhögskolan. Participated on a team from Swedish International Development Agency (SIDA) that performed a capacity analysis of social support in South Africa. Selected graduate voting member for Nobel Prize in Economics, 1996. Pre-doctoral program evaluation research training (forskarutbildning).

BSW and BA, Social Work and Modern Languages, Kansas State University, 1995. Graduate cum laude. Exchange student, University of Picardie, France with focus on Administrative Law. BSW practicum at Doncaster, South Yorkshire (UK) Council House in the Children's Services Department. Volunteer hours through Court Appointed Special Advocates (CASA).

EXPERIENCE

Instructional Dean - AELLC, Emily Griffith Technical College, 2017-2018

Developed strategic plans, provided federal, state, and local grant management, supervised educational staff, provided staff trainings, and developed marketing strategies. Managed multi-million dollar budget and developed innovative educational programs to help support recent immigrants and refugees within the Denver Metropolitan Area. Coordinated with workforce providers and counselors. Supervised all academic advising for incoming students.

President, Launch Educational Services, LLC 2010 –2017

Managed all operations for academic coaching and educational consulting firm. Major projects include: Creation of Launch Pad, a student academic coaching program with a focus on incorporating executive functioning skills and movement for middle and high school aged students; Training Program for International NGOs for Posner Center in Denver; Professional development training programs for teachers on behalf of Mercy Corps in Haiti on effects of trauma in children following 2010 earthquake; Curriculum development, evaluations, and teacher trainings for Healing Waters International in Guatemala, Haiti, and Dominican Republic; Teacher training in Beijing, China for China Language Education; Filled interim Chief Academic Officer (CAO) and ED roles in nonprofit educational settings.

Principal, Denver Public Schools - Denver Language School, 2012-2014

Supervision of over 60 faculty and staff in diverse urban language immersion school. Led professional development for faculty and provided needs-based trainings for non-native English speakers. Direct

supervision of school support staff, including social workers and school psychologists. Coordinated with Lead Teachers to develop language rich curriculum in line with full language immersion theories and Common Core State Standards. Coordinated all community outreach, including partnerships with The Chamber of the Americas, Colorado Chinese Chamber of Commerce and Governor's Office of Economic Development and International Trade (OEDIT).

Principal, Archdiocese of Denver - St. John the Evangelist, 2008-2010

Supervision of over 50 faculty and staff in independent PreK-8 school. Developed multiple innovative educational programs in line with school mission using federal and private funding, including an innovative literacy tutoring program and computer lab using donations from HP and IBM. Oversaw and directly implemented special education programming and GT programming, as well as all RtI Team coordination. Oversaw positive enrollment growth in economic recession through active community outreach. Achieved 96% approval rating in community.

Assistant Professor, Regis University, 2006-2008

Developed and taught courses in Master's of Nonprofit Management Program (MNM). Performed student advising and graduation approvals. Managed Service Oriented Field Experiences (SOFE) capstone program in domestic and international settings and oversaw curriculum development and alignment. Appointed to serve as program curriculum assessor for North Central accreditation on faculty committee.

OTHER RELEVANT POSITIONS

- Counselor/Resource Coordinator, Diocese of Arlington
- Teacher, Diocese of Arlington

PROFESSIONAL EXAMS

- Principal PLACE Examination (Colorado)
- Administrator PLACE Examination (Colorado)
- School Social Worker PLACE Examination (Colorado)

TRAININGS & COURSES

- Acumen and IDEO.org - Design Thinking for Innovation (2015)
- Beyond the Diagnosis: Autism Across the Lifespan. Guest Participant. University of Kansas Life Span Institute. (2010)
- Administrator Training - Educational Leadership. Archdiocese of Denver (2008-2009)
- Clinical Supervision in Education. Marymount University, Arlington, VA (2002)
- Communication Strategies in Education. Marymount University, Arlington, VA (2001)
- Mercy Corps training on Trauma Counseling. Arlington, VA (2001-2002)

AWARDS AND RECOGNITION

- Recipient of the Erie Chamber of Commerce Best Service Business (2015) and Best Educational Organization (2016)
- Board Member, Longmont Youth Symphony (2016-Present)
- Secretary for Longmont Performing Arts Initiative (2018-Present)
- Board Member, City Club of Denver (2014- 2016), representing Colorado educational issues- Functioned as interim ED
- "People On the Move", Denver Business Journal (August 2014)
- Administrator Award, Asian Education Advisory Council, Denver Public Schools (2013)
- Steering Committee Member for AdvancEd Accreditation, Archdiocese of Denver (2009-2010)
- Faculty Member on North Central Accreditation Team, Regis University (2008)
- Excellence in Student Teaching Supervision Award, Marymount University, Arlington, VA (2001)
- Graduate Student Voting Member for Nobel Prize, Stockholm University (1996)

PUBLICATIONS & PRESENTATIONS

- City Club of Denver. Featured Presenter. "Haiti Post Earthquake: Challenges Faced When Moving From Relief to Reconstruction" - on Educational System in Haiti Post January 10 (May 31, 2011)
- Amodio, S. (2007) Education and Empowerment: Establishment of a Vocational Training Program in Nativity Village, Haiti. Regent University: Virginia Beach, VA ISBN 0549348263, 9780549348269
- Amodio, S. (book review). VOLUNTAS: International Journal of Voluntary and Nonprofit Organizations June 2008, Volume 19, Issue 2, p 211-217
- Amodio, S. (book review). Journal of Haitian Studies , Vol. 13, No. 2 , Fall 2007
- National Council for Voluntary Organizations (NCVO) - Guest Participant in Round Table Conference- London, UK (July, 2007)
- Facilitator and Presenter at Regis-MNM Summer Symposium "Leadership in International Civil Society" (July, 2007). Topic of Presentation: "Cross Cultural Communication Strategies"

MEMBERSHIPS

- ACSD - Since 2008
- American Psychological Association - Division 15 - Educational Psychology

RICK JOHNSON

EXPERIENCE

Vice President, Administration & Finance, Laramie County Community College, July 2015 – Present

Residential, Multi-Campus, Comprehensive Community College, serving 6,000 students

Chief Operating/Financial Officer, reporting to the President, with responsibility for a complex \$70M business operation. Direct leadership of Capital Planning & Construction, Finance, Accounting, Facilities, Security, Risk Management, Contracting, Procurement, and other Auxiliary Operations.

- Valuable, effective presenter to the Board of Trustees possessing the ability to simplify complex matters resulting in productive discussions and sound decision making.
- Led \$150M in capital planning and construction activities delivering a transformation of the college.
- Developed a variety of predictive modeling tools to validate the cost viability of new facilities and initiatives.
- Implemented facilities debt restructuring strategies that resulted in \$1.6M in cost savings.
- Innovatively navigated \$5M in reductions in external funding while maintaining key expansions and growth.
- Led the innovation to effectively implement an E-sign solution for campus, delivering impressive efficiencies.
- Executed a comprehensive wayfinding system, establishing clear and consistent directional assets, which transformed guiding people to their destinations, contributing to a sense of well-being, safety, and security.
- Created a robust risk management program mitigating serious liabilities, which resulted in enhanced environmental safety and reduced insurance escalations.

Chief Operating/Financial Officer (Assistant Dean), University of Colorado Boulder - Leeds School of Business, August 2011 – July 2015

Innovative business school serving 3,300 students, with a goal of reaching the top 100 of US Business Schools

Leadership of the administrative and financial operations of the business school with a \$35M budget and \$60M endowment. Direct responsibility for Finance, Human Resources, Information Technology and Facilities.

- Developed the administrative and financial footing necessary to rapidly scale operations to accommodate new degree programs, donor commitments and critical partnerships with industry, rising to the Forbes 69th best US business school by 2015.

- Led the feasibility and program planning phases for a multi-million dollar facilities expansion project.
- Strategically re-organized a very complex financial structure to align with the multi-faceted growth vision.
- Respected for successfully guiding, preparing, and equipping staff to adapt to the organizational change.
- Selected for the CU Human Resources Steering Team, driving enhancements to elevate CU's talent acquisition, candidate selection, and hiring processes.
- One of 12 CU leaders selected for the University of Colorado System 2013 Excellence in Leadership Program.
- Delivered valued administrative and financial guidance to 4 academic divisions, 6 Centers of Excellence, and 10 diverse departments.

Division Administrator, National Center for Atmospheric Research (NCAR), June 2008 – August 2011

Preeminent center of research and engineering excellence in earth system science, with 7 distinct divisions, serving a consortium of 115 universities, and partnering with research entities on a global scale

Chief operating and financial officer of the division with a \$15M budget, and 120 scientists, engineers and staff. Direct responsibility for Finance, Human Resources, Technology, Facilities and Grants.

- Inspired the organization to implement project management methodologies for the engineering teams to generate predictable outcomes, cost containment and schedule control of instrumentation projects.
- Provided successful financial strategies to mitigate the impact of two consecutive years of funding declines.
- Seamlessly managed the financial and administrative complexities of multitudes of scientific research projects, funded by dozens of business relationships with both US and international agencies.

Director, Auxiliary Enterprises, University of Wyoming, May 2001 – May 2008

Largest university in Wyoming serving 14,000 students

Executive leadership of an entrepreneurial, profit-structured, enterprise comprised of twelve distinct campus operations with a \$14M budget and 140 staff members.

- Defined the vision and brought the strategic expertise to create a successful re-organization of the for-profit enterprise that resulted in 92% revenue growth during my tenure.
- Generated \$1M per year in net operating profits that were returned to the institution.
- Established a one-of-a-kind strategic intellectual property partnership with the State of Wyoming to leverage common branding, with a focus on the tourism industry and commercial retail environment.

Served previously as Assistant Director, Auxiliary Enterprises; and Intellectual Property Licensing Manager